



RURAL TOURISM STUDIO

OREGON TOURISM TRENDS

WILD RIVERS COAST
OCTOBER 2013 - JANUARY 2014

10.7%+



7,500,000 direct jobs

14,000,000 total jobs

Resulting from visitors traveling the US
and spending \$, Euros, Yen, RMB...

\$1,800,000,000,000

in total spending

America's travel and tourism industry is seen as a primary driver of our nation's economy

Travel Exports
up 13.7%
in 2011



120,000 jobs
created by the
travel and tourism
industry in 2011



Travel exports
growing at an
annual rate of
10% in 2012



81,000 additional
jobs added during
2012





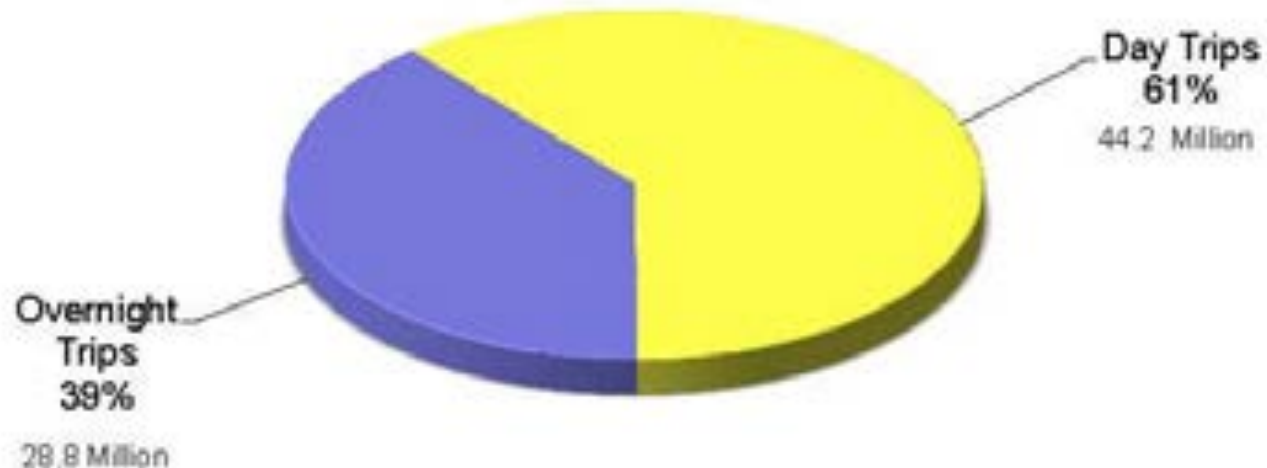
How does this translate in Oregon?



Total Size of Oregon's Travel Market



Total Person-Trips* = 73 Million



*Total volume includes both adults and children

Oregon 2011 Visitor Report, Longwoods International
Available at: www.Industry.TravelOregon.com



Canada - #1

Japan

Australia

UK

Germany



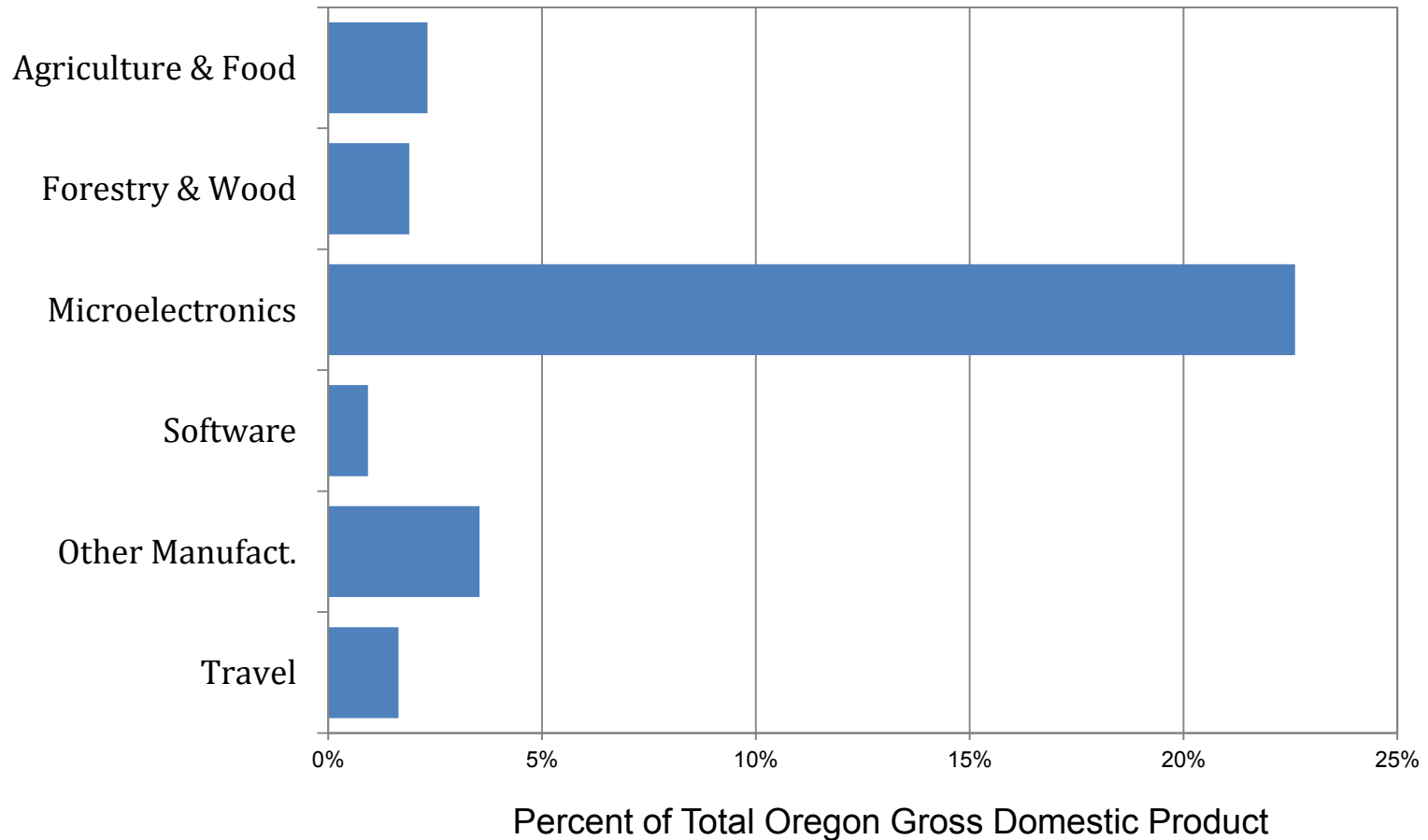
Why Tourism Matters To Oregon

2012

- \$9.2 billion in direct travel spending (+3.2%)
- \$2.2 billion in travel generated earnings
- \$363 million in local and state taxes (+3.3%)
- GDP of the travel industry = \$3.4 billion
- Tourism = one of Oregon's top **export-oriented** industries



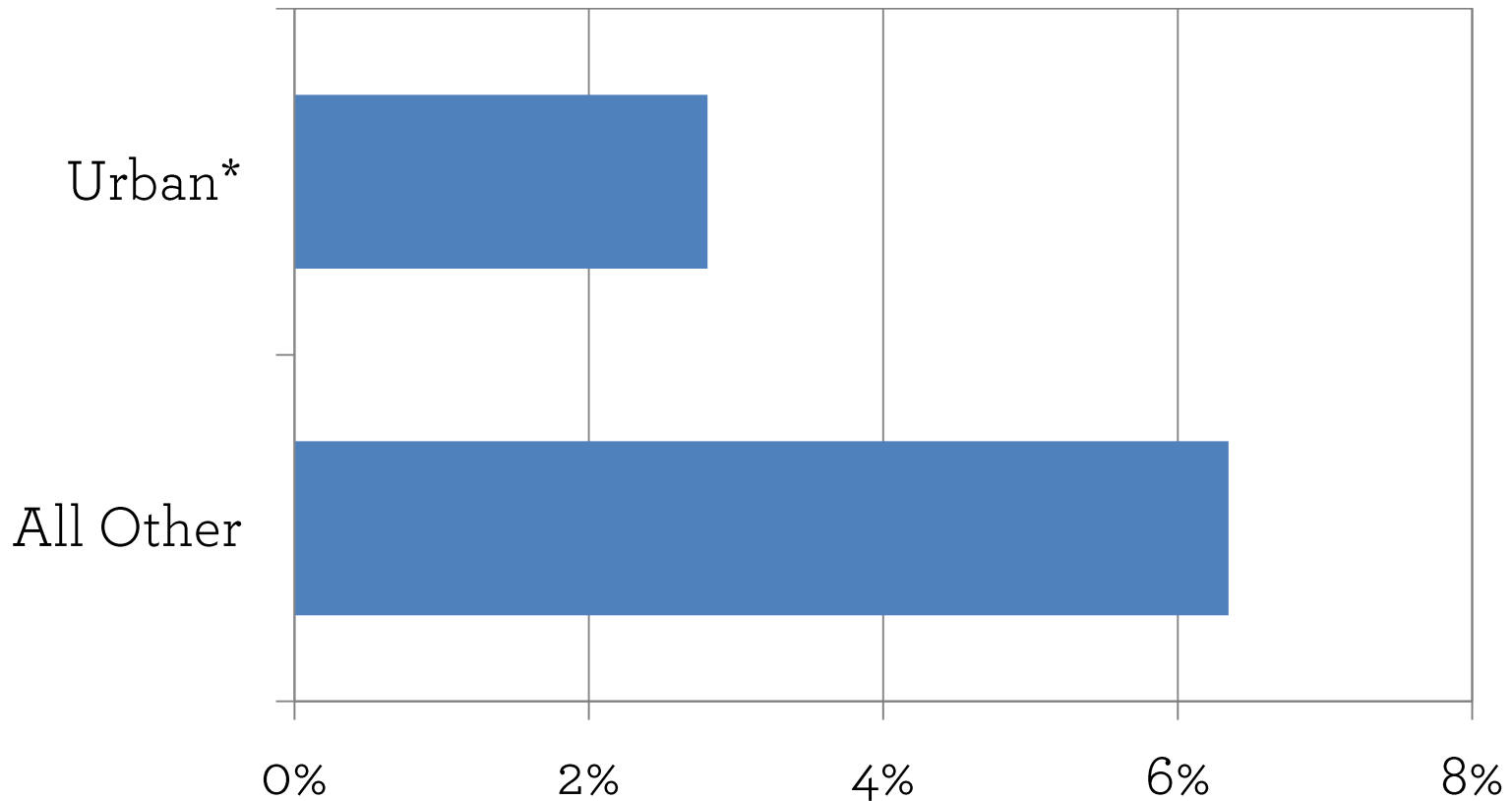
GDP of Leading Export-Oriented Industries (2011)





Rural vs. Urban Impact (2011)

Travel Generated Employment as a % of Total Employment



TOURISM & HOSPITALITY INDUSTRY CLUSTER MAP

The Industry Cluster map is designed to be a visual narrative of the relationships or categories that make up an industry. It immediately demonstrates the strategic interdependencies that define an industry. The map can be developed on multiple levels to show additional corresponding relationships that support any given sector or the whole industry, (examples: agriculture, real estate development, production and processing services). This specific map has been created to show what makes up the tourism industry from the standpoint of what the consumer experiences and what is actually marketed and sold. It is important to understand that the industry benefits as a whole when each of the categories is healthy and vibrant—it's what makes Oregon a destination point rather than a stop-over point.





How does this translate in Oregon?

91,100 Oregonians DIRECTLY employed (2011)

Direct: lodging properties, restaurants, attractions, guide & outfitter businesses, tour operators, visitor information centers, convention and visitor bureaus

41,000 jobs supported INDIRECTLY (2011)

Indirect: farms, wineries, printing services, professional services, transportation and more...



“Increasingly what will make us happy is spending our time and our money satisfying the desire for authenticity.”

-Joseph Pine, TED Conference



“...people receive more enduring pleasure and satisfaction from investing in life experiences than material possessions.”

*-Professor Leaf Van Boven,
University of Colorado/Cornell Study*





EAT





PLAY









Oregon's Tourism Regions



OREGON COAST TRENDS

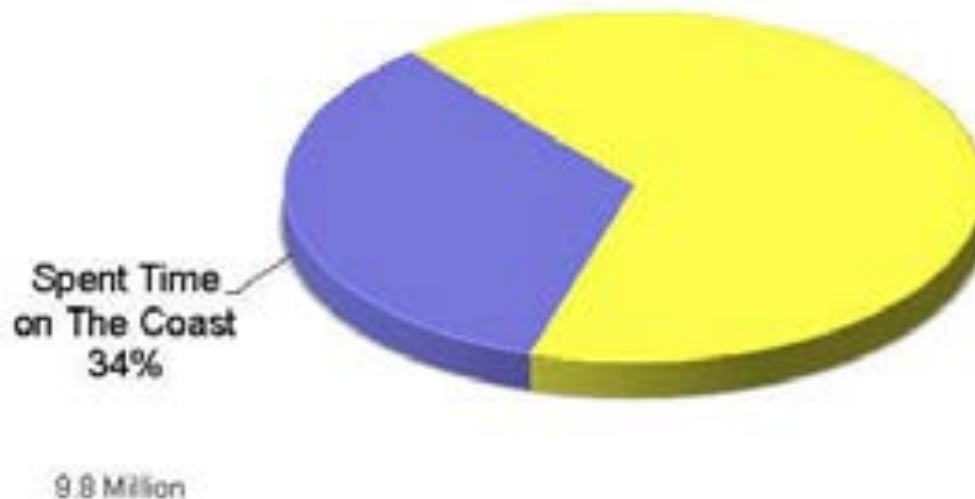
Marcus Hinz

Oregon Coast Visitors Association

Size of the Oregon Coast Overnight Travel Market



Total Overnight Trips to Oregon* = 28.8 Million



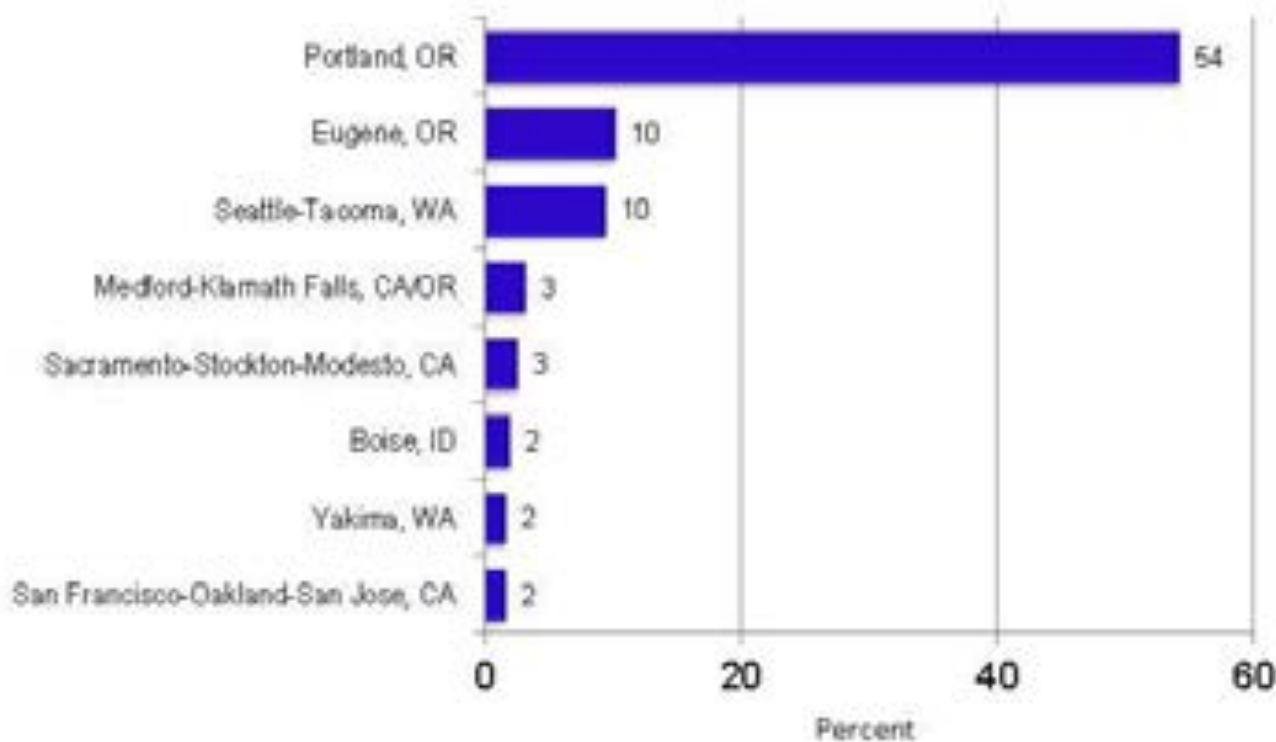
*Includes both adults and children

*Oregon 2011 Regional Visitor Report, Regional Visitor Research
Longwoods International*

Origin of Overnight Trip to Central Oregon (2011)



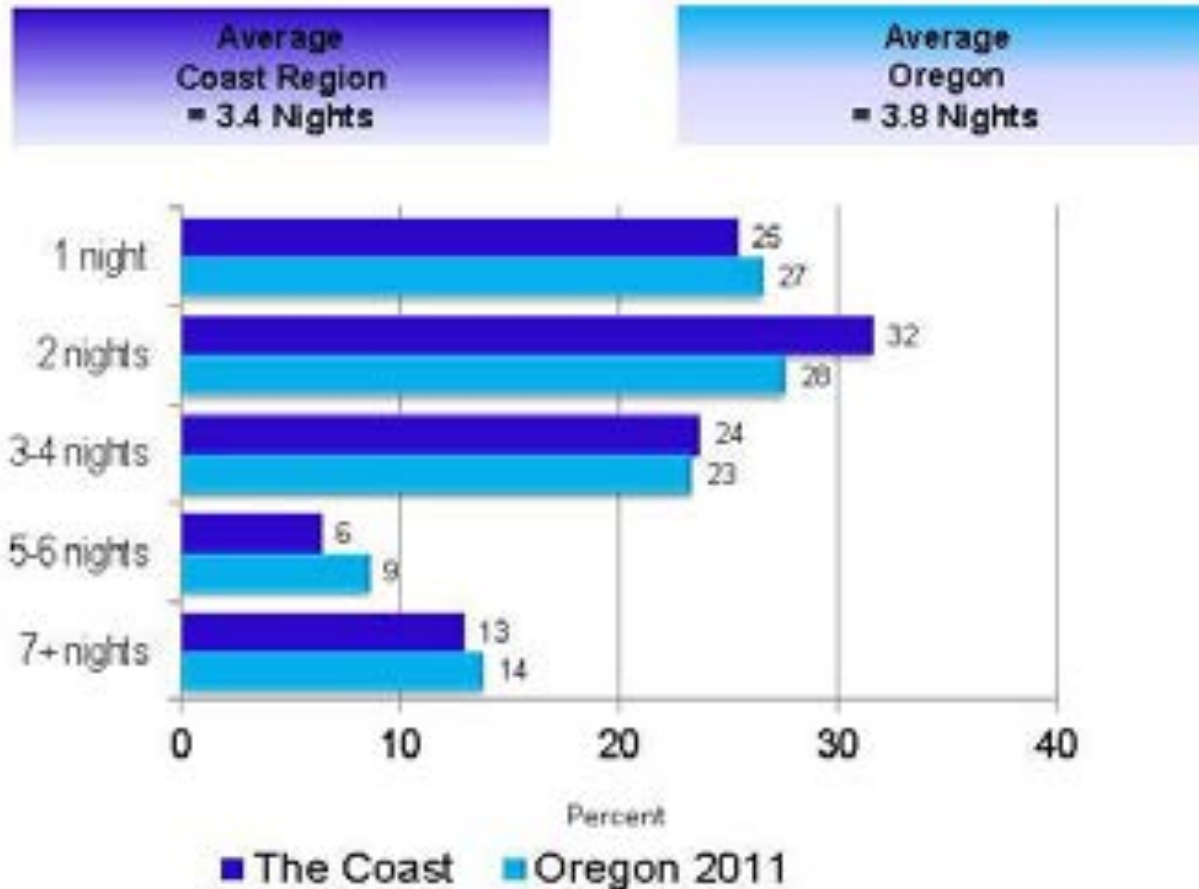
Base: Overnight Marketable Trips



Total Nights Away on Trip (2011)



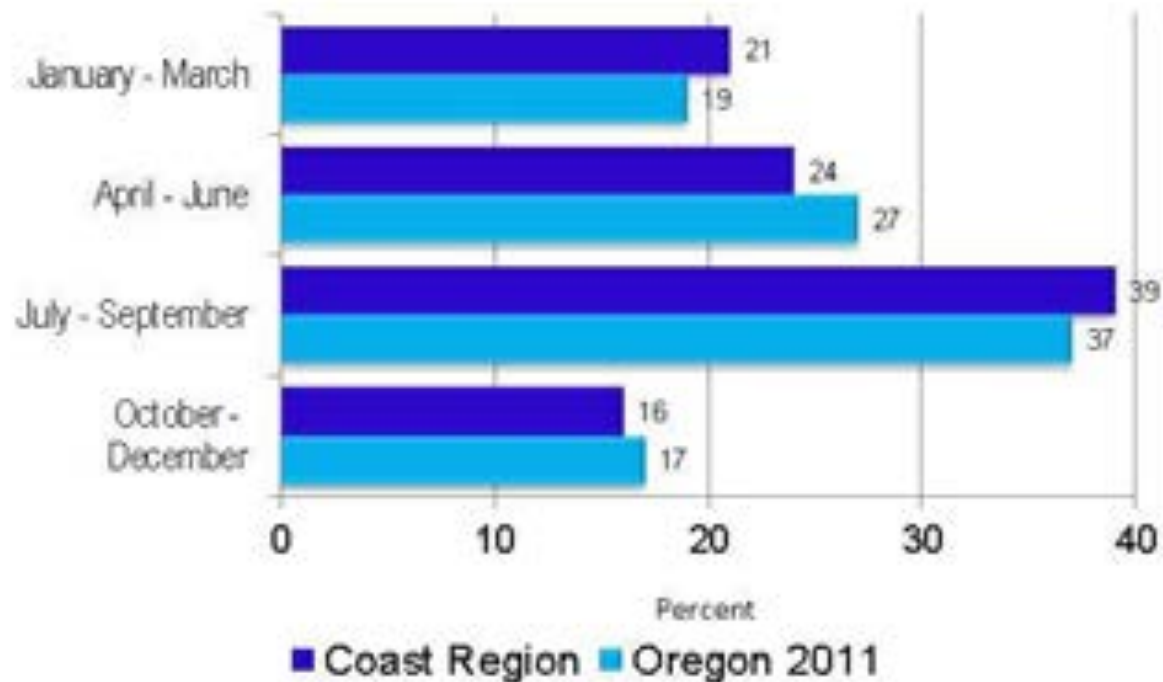
Base: Overnight Marketable Trips



Season of Trip (2011)



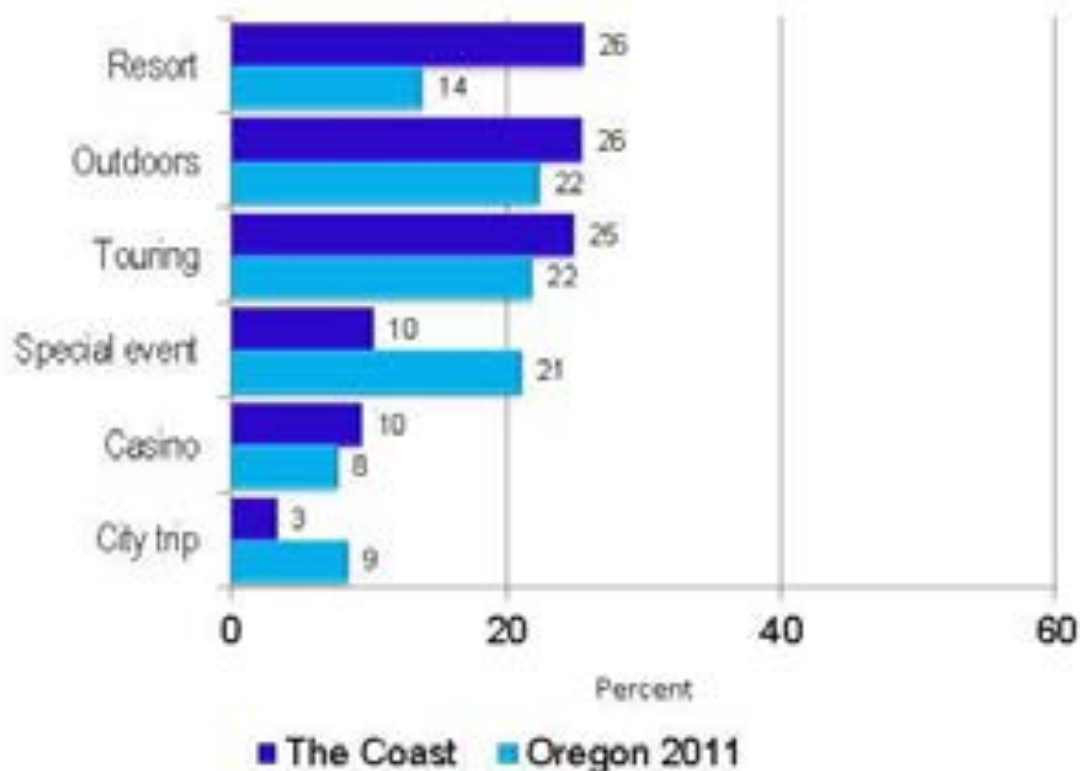
Base: Overnight Marketable Trips



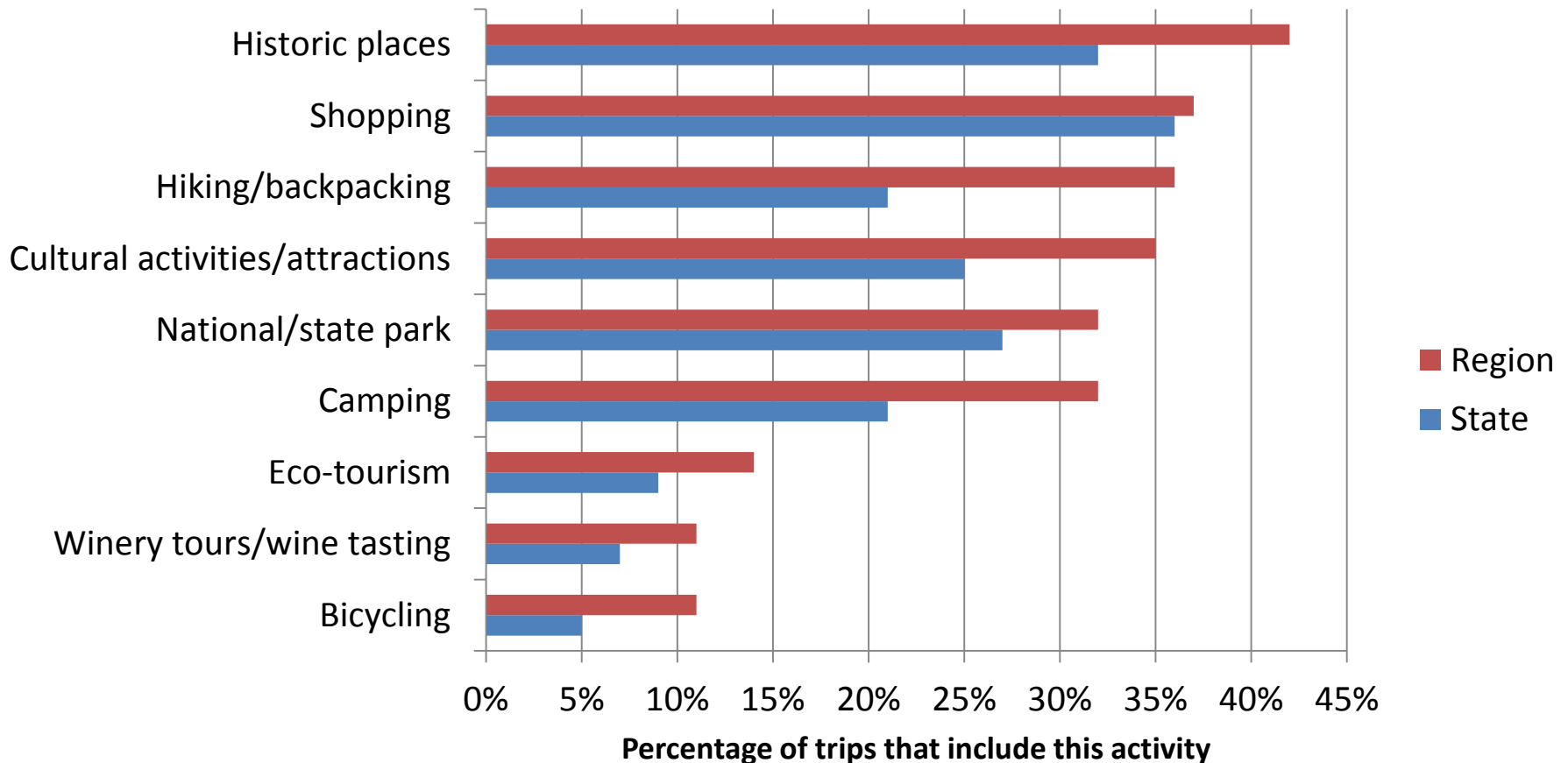
Main Purpose of Marketable Trip – The Coast vs. State Norm (2011)



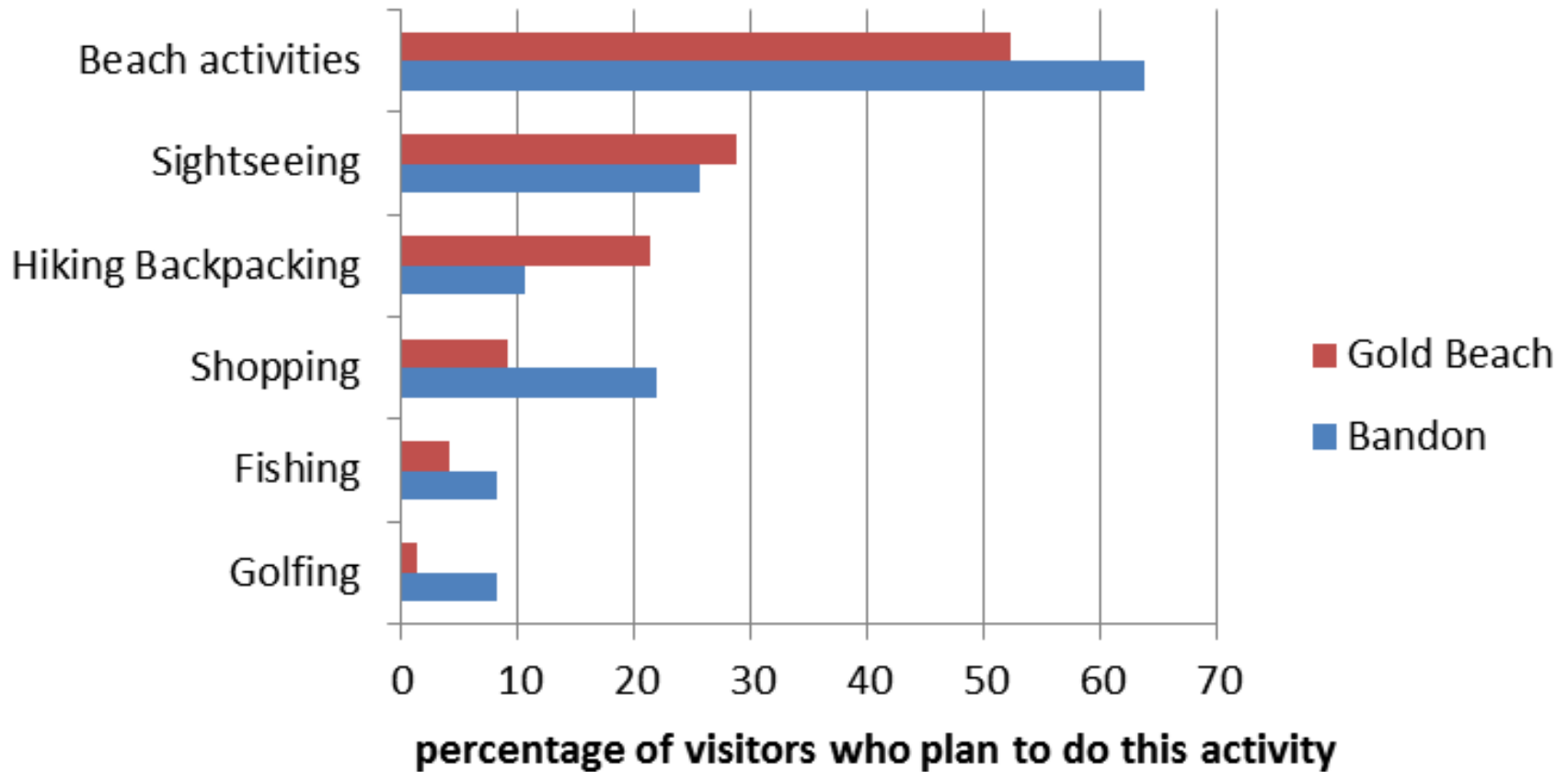
Base: Overnight Marketable Trips



Most Popular Visitor Activities Central Oregon (2011)



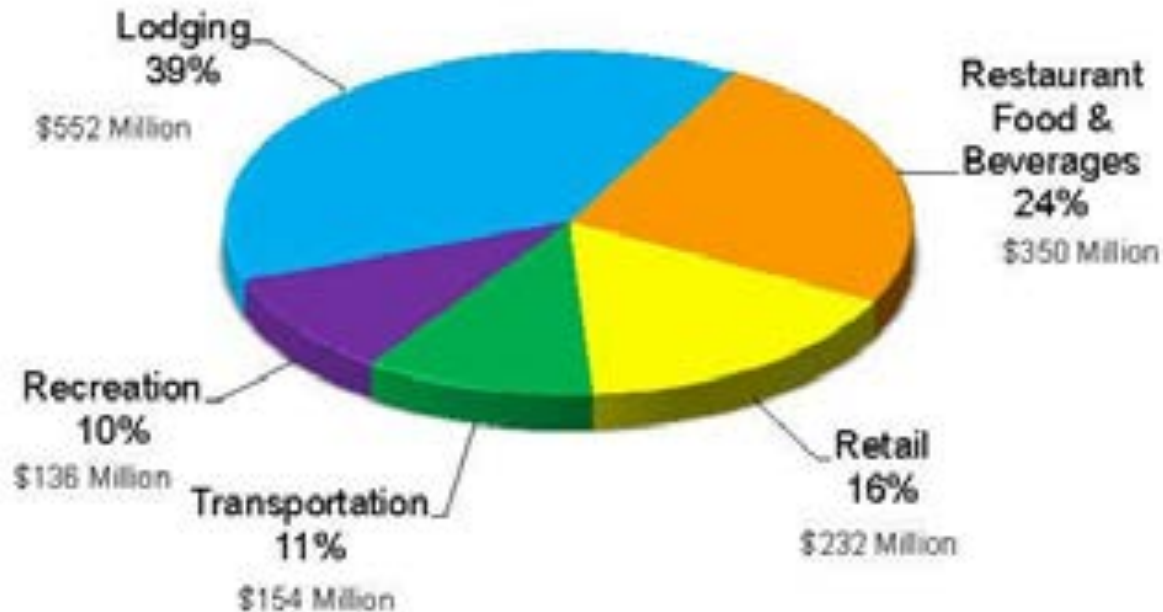
Top Activities Planned by Visitors to Bandon and Gold Beach



2011 Overnight Spending – by Sector



2011 Coast Region Spending = \$1.4 Billion



Average per person expenditure on overnight trips

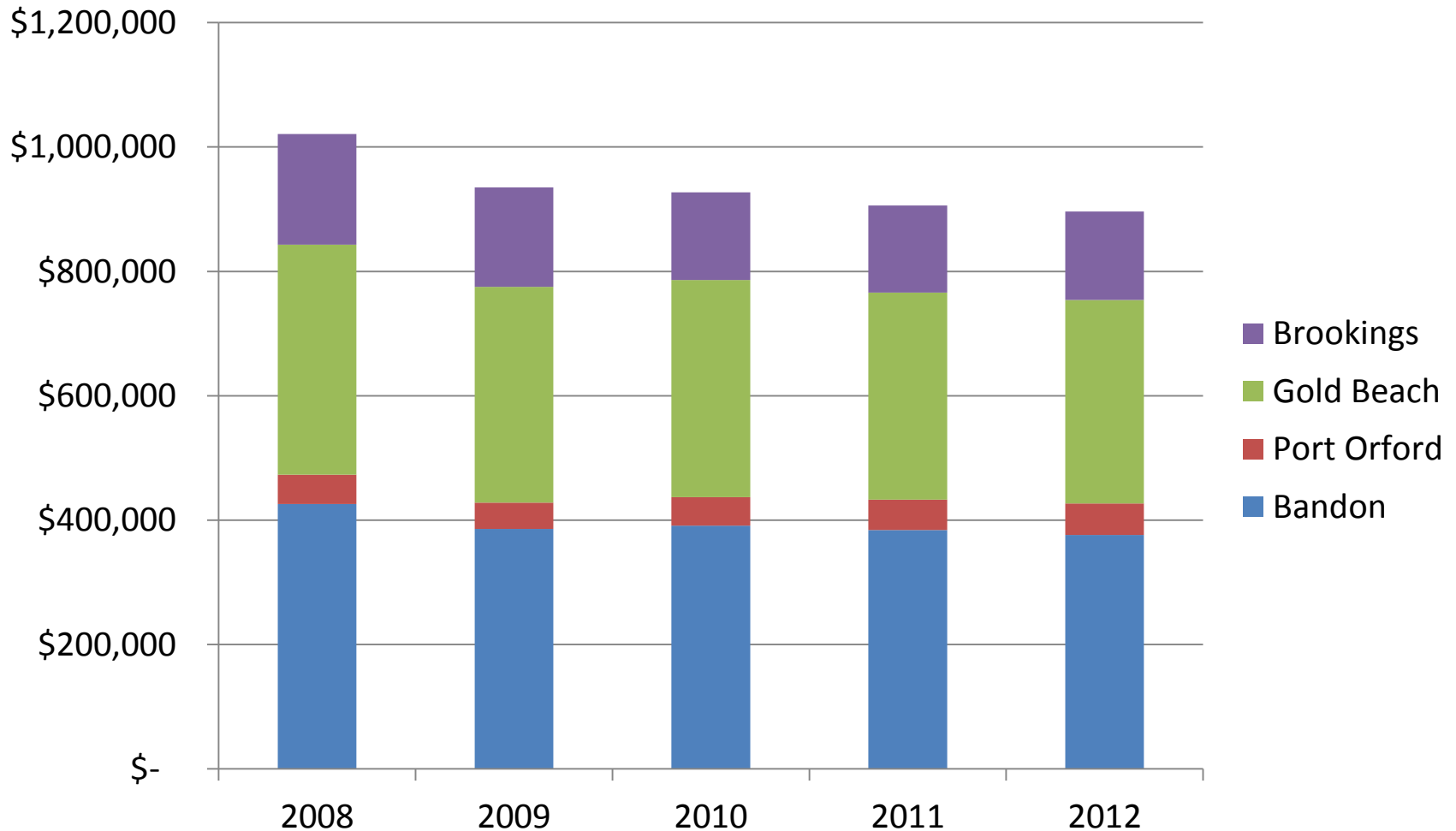


Base: Total Overnight Person-Trips

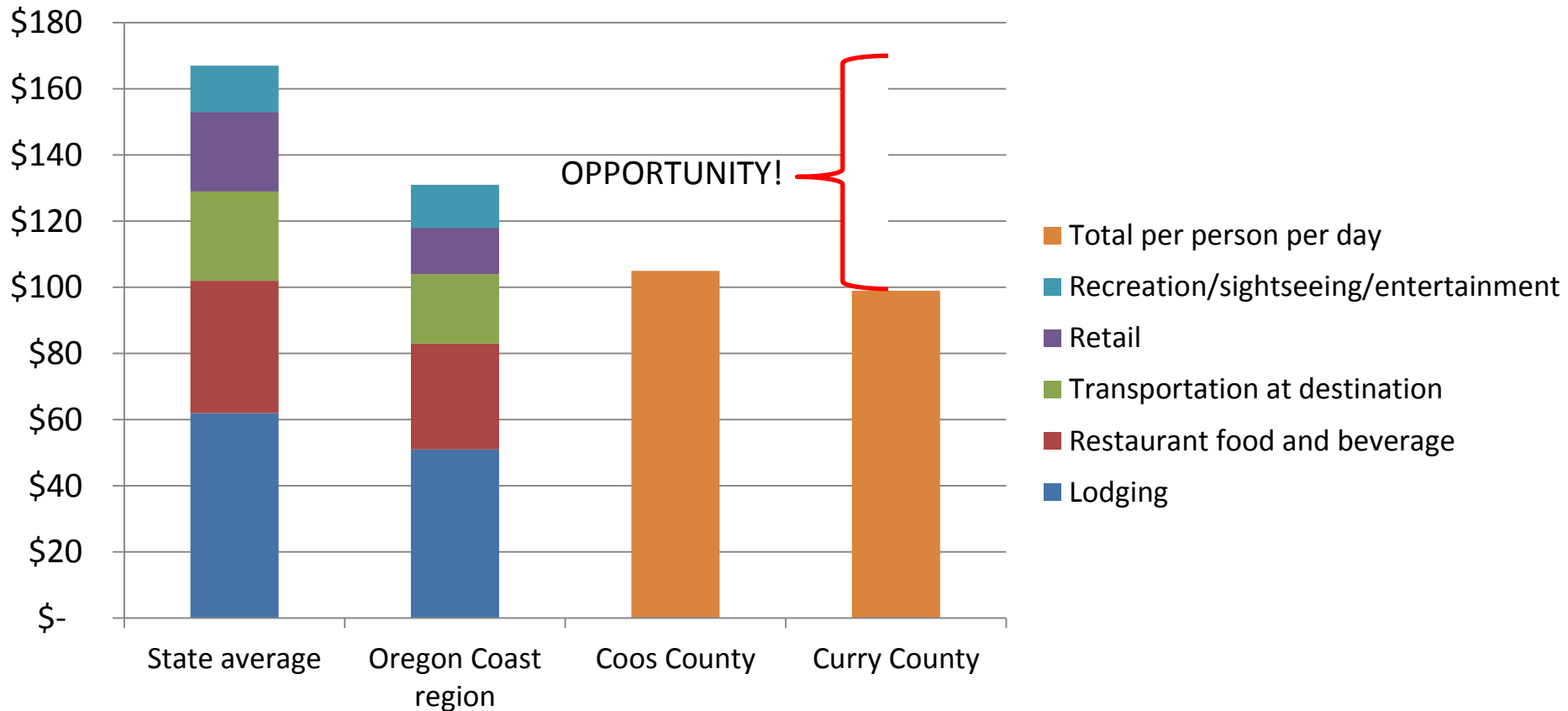


Local Room Tax Collections, 2008-12

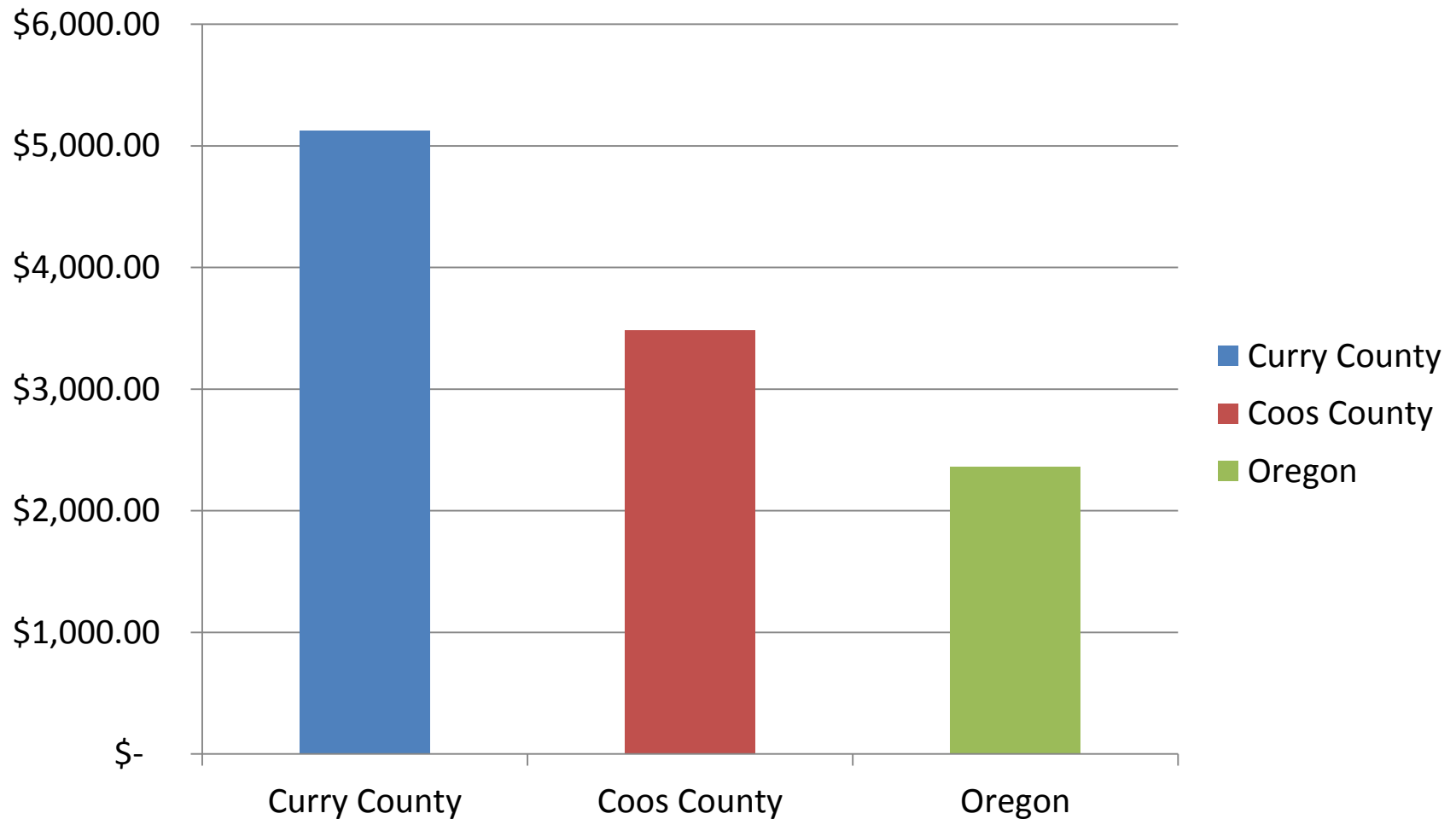
Wild Rivers Coast



Average per person daily expenditures on overnight trips (2011)



Direct Visitor Spending Per Capita by County (2012)



Percent of Total Non-Farm Jobs Related to Tourism, Curry County 2002-2012



Oregon Department of Labor
Oregon Travel Impacts 1991-2012, Dean Runyan Associates